

Release Notes - December 2023

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Our new release includes features like temporary split workflow, enhanced revision tracking, and a preview function for bulk matching parameters.

1. Admin

1.1 Excel Export/Import Companies List

The instance list of customer and sub-supplier companies is now available for download in Excel (.xlsx) format. Users can add or modify existing company information and upload the list to sync changes back to DocBoss. [Learn more.](#)

1.2 Additional Fields for User Management

User management has been improved with additional fields. Users can set the Job Title under their profile, and it will populate onto distribution lists they are added to. The Employee ID field, a sortable text field, is available for additional user metadata.

2. Incoming Documents

2.1 Temporary Cards for Simultaneous Submission

In this release, a new feature called temporary cards enables users to submit multiple documents simultaneously. For instance, when returning a document with comments or any status that isn't marked as complete, users can choose to leave behind a temporary card to track final approval in that stage from the customer. These act as separate cards with their own workflow and can be merged at the user's convenience. [Learn more.](#)

2.2 Test Function for Bulk Matching

The bulk matching process is now simplified with a new test function. If a customer edits file names and users are uncertain about setting up bulk matching, this feature removes the guesswork. Users simply enter the parameters they'd like to use to split up sections of the file name, and DocBoss generates a preview of all segments that will be matched to document numbers. [Learn more.](#)

2.3 Page Range Preview

To enhance transparency in document processing, a page range preview feature has been introduced. This feature provides users with a snapshot of the page ranges that DocBoss will use to split uploaded PDFs into the received cover page, active file, and received comments pages. If, for instance, pages 1-3 are cover pages, 4-7 are the active file, and 8-9 are comments pages, DocBoss will list those values based on user input, allowing users to verify against the document.

3. Outstanding Actions

3.1 Bulk Complete Actions

A new feature enables users to complete actions in bulk, including on behalf of another user, with tracking available in the card history. [Learn more.](#)

3.2 Track Completed Actions by Revision

The new **Actions by Rev** field lists users who have completed a routing action on each revision of the document, providing better tracking capabilities.

3.3 Notify Multiple Users of Completed Actions

Users completing actions can now choose multiple recipients for DocBoss to notify when the action is completed.

4. Reporting

4.1 Excel format for Expediting Report

Expediting reports are now available in Excel (.xlsx) format. [Learn more.](#)

5. Submittals

5.1 Enhanced Revision Tracking

The new **Recipients by Rev** column in on project Card Lists displays recipients of previous submittals by revision, simplifying tracking of who received each version of documents.

5.2 Allow 'Problematic' Characters in File Names

Certain characters previously replaced with underscores are now allowed in outgoing file names. However, it is recommended to use them cautiously, adhering to best practices for various operating systems. [Learn more.](#)

6. Templates

6.1 Tag to Document Pivot for SDI (SDI Report by Tag)

This new output format lists the units on a project and cross-references the documents each unit is linked to. Users can create reports showing the status of linked documents for each unit. [Learn more.](#)

6.2 'DaysWithUs' Variable (Submittal History Array)

To showcase their team's quick turnaround between submittals, users can utilize the 'DaysWithUs' variable to output the days between the customer's return of a document and the next submission.

7. User Interface

7.1 Simplified Admin > General interface

Accordions have been added to simplify the interface under **Admin > General**.

7.2 Instance eSignature settings

Instance eSignature settings have been moved to the **Admin > Security Settings** area.

For more detailed information, refer to the respective documentation.
